

**IT Professional Technical Services  
Master Contract Program  
T#:902TS**

**Statement of Work (SOW)  
For Technology Services  
Issued By  
Minnesota State Retirement System (MSRS)**

**Project Title: Web Redesign**

**Service Categories:**

- Web Design & Development – HTML/ XML/ DHTML CSS Javascript
- Web Applications Specialist - Java/JSP/Servlets

**Business Need**

MSRS uses multiple websites to relay information to a variety of constituencies. In the spring of 2012, MSRS began the process of redesigning the website to combine three different websites ([www.msrs.state.mn.us](http://www.msrs.state.mn.us), [www.mndcplan.com](http://www.mndcplan.com), and [www.msrsinfo.com](http://www.msrsinfo.com)) into one common site with a common look/feel consistent with MSRS printed publications. This site was designed to be a content-managed site to allow for quick updates by subject matter experts and the integration of multi-media web tools for plan participants.

Overall, the project is about 80% complete. The site design, and approximately 90% of the content is complete for the new site. This Statement of Work (SOW) seeks a Vendor to make necessary design customizations to website elements that are not provided as an out-of-box feature in the Liferay CMS product. It also seeks assistance in launching the modified site in a new environment.

**Project Deliverables**

The work under this Statement of Work (SOW), detailed in the **Vendor Tasks** section, involves finishing development on a Liferay-based website, launching the website, and developing local capacity by training business and technical users. Specific deliverables include:

- Five Java portlet calculators (created by another Vendor) are tested and integrated into the website
- Liferay-based search function replaced with Google-, or Google-comparable search function
- Business users able to upload and edit content
- Website format and layout are customized to meet MSRS needs, particularly in the “FAQ” and “News” features
- Enable archival of old content
- Successful launch of browser-compatible website in coordination with MN.IT (Office of Enterprise Technology)
- Training provided so that:
  - Business users can tag content to improve search results, can add/remove pages, and can edit formatting of the website
  - Technical support users (Java developers) can implement future Java-based changes to the website framework; specifically Java-based calculators and interactive Java portlets
- Current documentation reviewed and corrected if necessary, and developer documentation on customizations (non-Liferay programming/configuration) to assist future web development

## Vendor Tasks

### A. Website Development

1. Integrate at least five Java portlet calculators that were created by another vendor.
2. Replace the Liferay out-of-the-box search feature with a Google- or comparable search feature.
  - a. Ensure that the search feature results in the most relevant information presented for the website user.
  - b. Ensure that all archived or deleted pages are excluded from search.
3. Complete customization of Liferay (out-of-the box) calendar to add color for specific types of events, customize the events listed on the calendar, and remove events that will not be used on the live site.
4. Ensure all icons and pictures used on the site are available for business users to add to the site.
5. Discuss customization of items specific to the site map layout, formatting of *Frequently Asked Questions* feature of site, and the *News* pages.
6. Modify the dynamic data list from existing HTML format to a rich text editor.
7. Assist with the removal or archive of old content to ensure that it is not viewable on the live site.
8. As part of professional project management, vendor will provide:
  - a) Clear means of communication
  - b) An objective change-control procedure
  - c) A process to recognize and manage risks
  - d) An approach for acceptance of project deliverables by MSRS users and technical team

**Note:** Prior to work beginning, MSRS will execute a signed Work Order Contract with a detailed Workplan with the vendor selected under this SOW. Any changes to a vendor's Workplan will be subject to the **Change Orders** and **Amendment** provisions (see **General Requirements**, below) in a mutually signed Work Order Contract.

### B. Launch

1. MN.IT hosts the MSRS website. The Vendor will work in consultation with MN.IT to troubleshoot deployment issues. The Vendor will ensure live deployment of the website to the public no later than the date listed in the **Project Schedule** section, below.
2. Ensure the website can be accessed and available to the following web browsers:
  - a. Chrome 21
  - b. Firefox 14
  - c. Internet Explorer 9
  - d. Internet Explorer 8
  - e. Safari 5.1

### C. Training

1. Business User Training: At least 6 hours of training for business users (not technical staff) on all content-based features of Liferay, workflow, security/user setup, including:
  - a) How to add appropriate tags for search results
  - b) How to remove old or bad pages on the site
  - c) How to update stylesheets and/or fonts
2. Training of Java Developers: At least 6 hours of training on all back-end features of Liferay to ensure that Developers can support Business Users, including the following topics:

- a) Implementation/modification of any Java-based changes to the website framework and any customized features such as the *Frequently Asked Questions* and *News* sections of the site.
- b) Addition of calculators and/or other interactive portlets

#### **D. Documentation**

1. Review user documentation created by a vendor whose contract expired 12/31/2013. Vendor will confirm the accuracy, and correct any errors in the documentation.
2. Develop detailed technical documentation of any processes or procedures that are customized and not part of the Liferay (out-of-the-box) software package for use by technical staff persons to be reasonably able to extend, customize, or troubleshoot the system.

### **Project Requirements**

MSRS implementation requirements include:

- For most of the Project, the Vendor will be expected to work remotely via VPN or offline. MSRS will provide VPN tokens.
- Compliance with the Statewide Enterprise Architecture
- Compliance with Statewide Project Management Methodology
- Compliance with applicable industry/agency standards
- Training will take place at the MSRS St. Paul location: *60 Empire Drive, St. Paul, MN 55103*.
- Vendor must pass background checks.

### **Project Schedule**

- The Project is estimated to start: **February 3, 2014**
- The Project, including training, must be completed before: **March 30, 2014**

### **Project Environment (State Resources)**

MSRS staff will provide:

- VPN access and VPN tokens to connect to test and production environments
- Necessary files/documentation/programs to facilitate development, testing, and documentation
- A single Project Manager during the project with three (3) to four (4) additional staff persons available as needed, approximately 2-5 hours per week
- A test and production environment utilizing Websphere v7.5 as the application server and DB2 v10 for the database running in a Linux environment
- Liferay software and currently completed customizations

### **Required Skills (to be scored as pass/fail)**

Eligible vendors must be approved under the 902TS Master Contract Program in all these categories:

- Web Design & Development – HTML/ XML/ DHTML CSS Javascript
- Web Applications Specialist - Java/JSP/Servlets

### **Desired Skills**

- Strong knowledge of Liferay software; preferably a Liferay service partner
- Experience deploying a website developed in Liferay in a Websphere 7.5 environment
- Experience in instructor-led training
- Demonstrated ability to write user- and technical documentation

## Process Schedule

Event	Date/Time
Deadline for Vendor Questions	1/16/2014 at 2:30 p.m. CST
Anticipated Posted Response to Questions	1/17/2014
Vendor Proposals due	1/21/2014 at 2:30 p.m. CST
Anticipated MSRS Proposal evaluation begins	1/21/2014
Anticipated MSRS Proposal evaluation & decision completed	1/24/2014

## Questions and Answers

Any questions regarding this Statement of Work should be submitted via e-mail according to the date and time listed in the **Process Schedule** to:

Daniel McLean, Contract Administrator  
Minnesota State Retirement System (MSRS)  
[daniel.mclean@msrs.us](mailto:daniel.mclean@msrs.us)

Questions and answers will be posted on the Office of MN.IT Services website ([http://mn.gov/buyit/statements/mcp902ts\\_active.html](http://mn.gov/buyit/statements/mcp902ts_active.html)) according to the **Process Schedule**.

Other persons ARE NOT authorized to discuss this Statement of Work or its requirements with anyone throughout the selection process and Vendors should not rely on information obtained from non-authorized individuals. If it is discovered a Vendor contacted other State staff other than the individual above, the Vendor's Proposal may be removed from further consideration.

The State reserves the right to determine if further information is needed to better understand the information presented. This may include a request for a vendor presentation and/or an interview.

## Proposal Evaluation Process

This Statement of Work does not obligate the state to award a work order or complete the assignment, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest. The Agency reserves the right to reject any and all Proposals. Proposals will be evaluated on a 1,000-point scale:

Evaluation Criteria	Points
Resource experience with the listed Required and Desired skills	200 points
Resource experience with similar projects	300 points
Quality of Workplan	200 points
Cost Proposal	300 points

The Cost Proposal with the lowest cost receives 300 points. Other Cost Proposals are evaluated according to this formula:

$$\frac{\text{Amount of Cost Proposal with Lowest Cost}}{\text{Amount of Vendor's Cost Proposal}} \times \text{Maximum Price Points (300)}$$

## How to Propose

Vendor Proposals should include the following documents:

### 1. Cover Letter

- Vendor Firm Name
- Vendor Street Address, City, State, and ZIP Code

- c) Vendor's Contact's name, direct phone number, and email
- d) Whether the Vendor is claiming certified "Targeted Group Businesses or Individual" status (see General Requirements, below)
- e) Name(s) of individual(s) to be assigned to this project (one or more individuals, also known as a "Resource")

## 2. Overall Experience

- a) Attach résumés (s) for proposed Resource individuals in addition to the narrative description. Be certain the Résumés have dates of work and notes whether the Resource was an employee or subcontractor. *Note:* Résumés and other information about personnel should not, if possible, contain personal telephone numbers, home addresses or home email addresses. If it is necessary to include personal contact information, please clearly indicate in the Proposal that personal contact information is being provided.
- b) Provide narrative, including companies and projects where the Resource has demonstrated the **Desired Skills**, listed above; in particular, provide a list of similar corporate websites completed by this Resource in the past three years.
- c) Include the name of at least one reference who can speak to the Resources work on similar projects completed in the past three years. Include the company name and address, reference name, reference email, reference phone number and a brief description of the project this Resource completed.

## 3. Workplan

Provide a comprehensive Workplan document:

- a) Describe how the Resource plans to complete each of the tasks in the **Vendor Tasks** section, above. Provide the proposed start and end dates, and the individual(s) responsible for each task. (Cost information for each task should be provided separately in a **Cost Proposal**, as described below.)
- b) Vendors are encouraged to propose additional tasks if they will substantially improve the results of the Project. These items should be separated from the required items on the **Cost Proposal**.
- c) Describe how the Resource will apply Project Management as described in Vendor Tasks; in particular, describe how the Resource, subject to the **Amendment** and **Change Orders** provisions (see **General Requirements**, below) in a signed Work Order Contract, will manage communication, project risks, changes, and deliverables.

## 4. Cost Proposal

In Microsoft Excel spreadsheet format, provide the cost detail for each task in the Workplan, with the hourly rate, proposed number of hours, and individual(s) responsible for each task (see example, **Attachment A**). Because the Cost Proposal portion of the evaluation is scored *after* the technical merits are evaluated, vendors should only provide cost information in **Attachment A**.

## 5. Applicable forms/documents

- a) A Conflict of Interest list as it relates to this project (see **Conflict of Interest**, under **General Requirements**, below)
- b) Affidavit of Noncollusion (**Attachment B**)
- c) Veteran-Owned/Service Disabled Veteran-Owned Preference Form, if applicable (**Attachment C**)
- d) Resident Vendor Form, if applicable (**Attachment D**)

## Proposal Submission Instructions

Send completed Proposals by email to:

Daniel McLean, Contract Administrator  
Minnesota State Retirement System (MSRS)  
[daniel.mclean@msrs.us](mailto:daniel.mclean@msrs.us)

Proposals must be received by the due date and time specified in the **Process Schedule** section, above.

## General Requirements

### Proposal Contents

By submission of a Proposal, Vendor warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the Vendor to suspension or debarment proceedings as well as other remedies available by law.

### Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

### Disposition of Responses

All materials submitted in response to this SOW will become property of the State and will become a public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected vendor. If the Vendor submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Vendor must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this SOW, the Vendor agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Vendor to be proprietary or trade secret materials.

### Conflicts of Interest

Vendor must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for Proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The Vendor warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage.

The Vendor agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organizational conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the Vendor was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

### **IT Accessibility Standards**

All documents and other work products delivered by the vendor must be accessible in order to conform to the State Accessibility Standard. Information about the Standard can be found at:  
<http://mn.gov/oet/policies-and-standards/accessibility/>.

### **Nonvisual Access Standards**

Nonvisual access standards require:

- 1) The effective interactive control and use of the technology, including the operating system, applications programs, prompts, and format of the data presented, are readily achievable by nonvisual means;
- 2) That the nonvisual access technology must be compatible with information technology used by other individuals with whom the blind or visually impaired individual must interact;
- 3) That nonvisual access technology must be integrated into networks used to share communications among employees, program participants, and the public; and
- 4) That the nonvisual access technology must have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

### **Preference to Targeted Group and Economically Disadvantaged Business and Individuals**

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group (TG) Businesses and individuals submitting Proposals as prime contractors will receive a six percent preference in the evaluation of their Proposal, and certified Economically Disadvantaged Businesses and individuals submitting Proposals as prime contractors will receive a six percent preference in the evaluation of their Proposal.

Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials Management Helpline at 651.296.2600, or you may reach the Helpline by email at [mmdhelp.line@state.mn.us](mailto:mmdhelp.line@state.mn.us). For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

Vendors should indicate their intent to claim TG status on their Proposal Cover Sheet.

## **Veteran-Owned Preference**

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference on state procurement to **certified small businesses** that are **majority-owned and operated by**:

- (1) Recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;
- (2) Veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or
- (3) Any other veteran-owned small businesses certified under section [16C.19](#), paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time.

If you are claiming the veteran-owned preference, **attach documentation, sign and return the Veteran-Owned Preference Form (Attachment C) with your response to this solicitation.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.

## **Foreign Outsourcing of Work Prohibited**

All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.



## Attachment A - Cost Proposal

[illegible]

# Affidavit of Noncollusion

State of Minnesota

**Instructions:** Please return this completed form as part of your Proposal.

**I swear (or affirm) under the penalty of perjury:**

1. That I am the Responder (if the Responder is an individual), a partner in the company (if the Responder is a partnership), or an officer or employee of the responding corporation having authority to sign on its behalf (if the Responder is a corporation).
2. That the attached proposal submitted in response to the **Minnesota State Retirement System (MSRS) Web Design Statement of Work (RFP15)** has been arrived at by the Responder independently and has been submitted without collusion with and without any agreement, understanding or planned common course of action with, any other Responder of materials, supplies, equipment, or services described in the Request for Proposals, designed to limit fair and open competition.
3. That the contents of the proposal have not been communicated by the Responder or its employees or agents to any person not an employee or agent of the Responder and will not be communicated to any such persons prior to the official opening of the proposals.
4. That I am fully informed regarding the accuracy of the statements made in this affidavit.

## Authorized Signature

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Responder's Firm's Name: \_\_\_\_\_

Print Authorized Representative name: \_\_\_\_\_ Title: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

## Notary Public

Subscribed and sworn to before me this:

\_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

\_\_\_\_\_  
Notary Public Signature

\_\_\_\_\_  
Commission Expires (mm/dd/yyyy)

**Attachment C**  
**STATE OF MINNESOTA**  
**VETERAN-OWNED PREFERENCE FORM**

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference in the amount bid on state procurement to **certified small businesses** that are **majority-owned and operated by**:

- (1) Recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;
- (2) Veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or
- (3) Any other veteran-owned small businesses certified under section 16C.19, paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time. When responding to a Request for Bid (RFB), the preference is applied only to the first \$500,000 of the response. When responding to a Request for Proposal (RFP), the preference is applied as detailed in the RFP.

If you are claiming the veteran-owned preference, **attach documentation, sign and return this form with your Proposal**. Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.

**I HEREBY CERTIFY THAT THE FIRM LISTED BELOW:**

My firm is a certified small business and it is majority-owned and operated by an eligible person as defined by Minn. Stat. § 16C.16, subd. 6a.

☐ **Yes**   ☐ **No** (must check yes or no) **State the type of documentation attached:** \_\_\_\_\_

**DOCUMENTATION MUST BE PROVIDED FOR ONE OF THE FOLLOWING REQUIREMENTS:**

- ☐ (1) recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;

**State the type of documentation attached:** \_\_\_\_\_

- ☐ (2) veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs;

**State the type of documentation attached:** \_\_\_\_\_

- ☐ (3) any other veteran-owned small businesses certified under Minnesota Statute Section 16C.19, paragraph (d).

**State the type of documentation attached:** \_\_\_\_\_

Name of Company: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Telephone: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

IF YOU ARE CLAIMING THE VETERAN-OWNED PREFERENCE, **ATTACH DOCUMENTATION, SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL.**

**Attachment D**  
**STATE OF MINNESOTA - RESIDENT VENDOR FORM**

In accordance with Laws of Minnesota 2013, Chapter 142, Article 3, Section 16, amending Minn. Stat. § 16C.02, subd. 13, a "Resident Vendor" means a person, firm, or corporation that:

- (1) is authorized to conduct business in the state of Minnesota on the date a solicitation for a contract is first advertised or announced. It includes a foreign corporation duly authorized to engage in business in Minnesota;
- (2) has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid or proposal for which any preference is sought;
- (3) has a business address in the state; and
- (4) has affirmatively claimed that status in the bid or proposal submission.

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To receive recognition as a Minnesota Resident Vendor ("Resident Vendor"), your company must meet each element of the statutory definition above by the solicitation opening date and time. If you wish to affirmatively claim Resident Vendor status, you should do so by submitting this form with your bid or proposal.

Resident Vendor status may be considered for purposes of resolving tied low bids or the application of a reciprocal preference.

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**I HEREBY CERTIFY THAT THE COMPANY LISTED BELOW:**

1. Is authorized to conduct business in the State of Minnesota on the date a solicitation for a contract is first advertised or announced. *(This includes a foreign corporation duly authorized to engage in business in Minnesota.)*  
☐ **Yes** ☐ **No (must check yes or no)**
2. Has paid unemployment taxes or income taxes in the State of Minnesota during the 12 calendar months immediately preceding submission of the bid or proposal for which any preference is sought.  
☐ **Yes** ☐ **No (must check yes or no)**
3. Has a business address in the State of Minnesota.  
☐ **Yes** ☐ **No (must check yes or no)**
4. Agrees to submit documentation, if requested, as part of the bid or proposal process, to verify compliance with the above statutory requirements.  
☐ **Yes** ☐ **No (must check yes or no)**

**BY SIGNING BELOW**, you are certifying your compliance with the requirements set forth herein and claiming Resident Vendor status in your bid or proposal submission.

Name of Company: \_\_\_\_\_ Date: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Telephone: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

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**IF YOU ARE CLAIMING RESIDENT VENDOR STATUS, SIGN AND RETURN THIS FORM WITH YOUR BID OR PROPOSAL SUBMISSION.**